drakelaneassociates

4cast Advanced User Guide

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Innovative Solutions for Education Management
www.drakelane.co.uk

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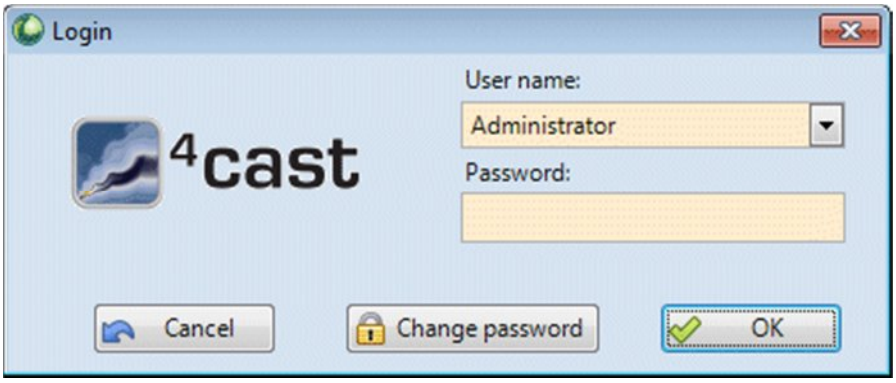
When to use this guide

Much of the content of this guide will be covered by our consultants during the implementation phase of our 4cast curriculum planning solution within your organisation.

It is designed for system Administrators or other users requiring more in-depth knowledge and will allow you to fully understand many of the tasks undertaken during implementation in addition to maintaining the system on an ongoing basis.

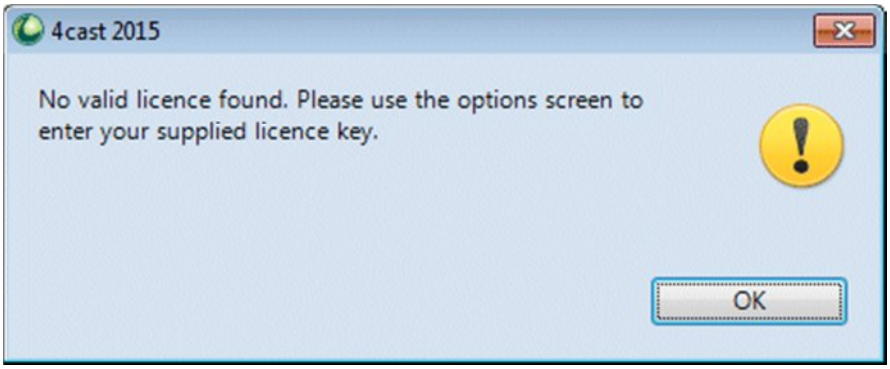
For the latest version of this guide please see the online help or use the Help and support ribbon tab within the software.

Logging in for the first time



Select your username from the drop-down list, enter your password (case sensitive) then click OK.

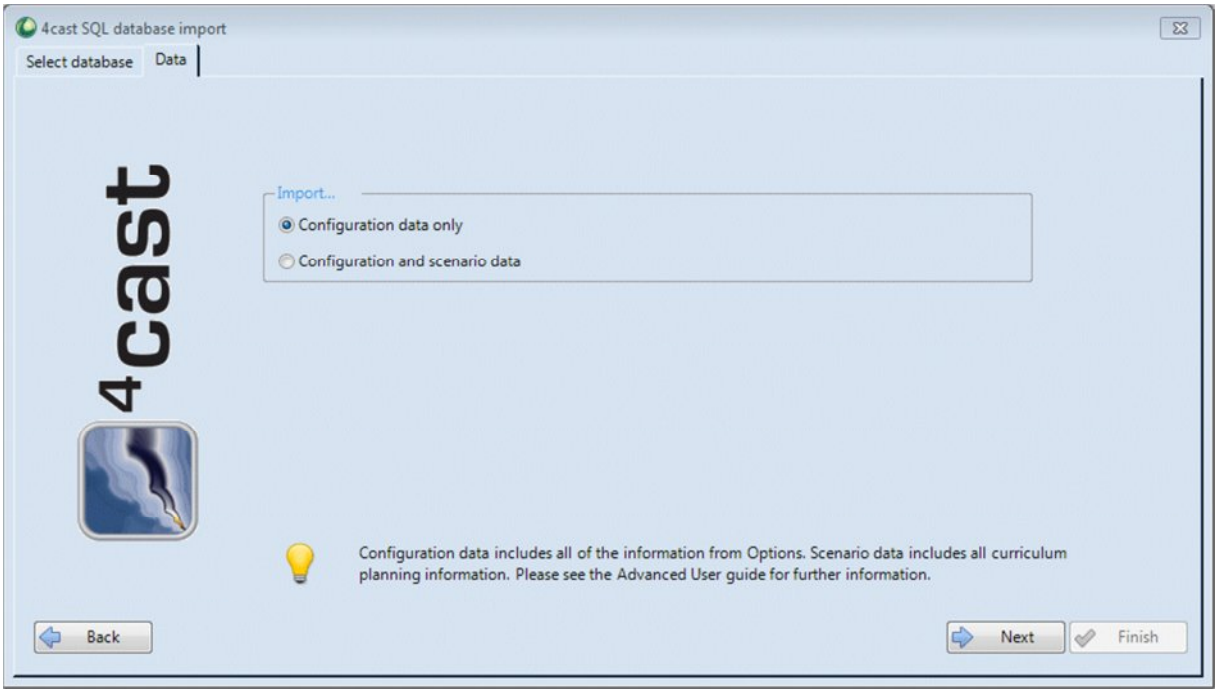
The system is installed with the default password Drake for the Administrator user. We suggest that this is changed. Note that passwords are case sensitive.



When logging in for the first time you will be taken automatically to the Options form to enter your licence details.

Transfer settings and data from a previous year

If you have used 4cast in a previous academic year then you can bring your settings and (optionally) planning data into the new installation by running the wizard available from the file menu import 4cast SQL database.


4cast SQL database import
Select database
Data
4cast
Import...
Configuration data only
Configuration and scenario data
Configuration data includes all of the information from Options. Scenario data includes all curriculum planning information. Please see the Advanced User guide for further information.
Back
Next
Finish

Configuration data will bring through most of what is available in the standard Options such as users, permissions, field information, approval statuses, etc.

You can also bring through the scenarios containing all planning data too, with the option of just the live or all scenarios. You have the option of rolling forward start and end dates 1 year. Target enrolment data will be zeroed.

For 4cast 2015 the minimum version requirement is 2014.04 for the import file. Due to the large number of structural changes the following data cannot be transferred from a previous version:

- Full cost and HE enrolments
- Layouts (All users will be initially assigned the system default layouts.)
- System formulas (The fields they link to may no longer exist.)

The following will be transferred with some alteration:

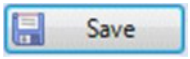
- Aim types (Core aims will be changed to main aims; all other aims will be changed to component aims. The original aim type will be stored in the new field 'ILR aim type'.)
- Incomes and costs. (All incomes will be assigned to 'Other learners'. All costs will be assigned to 'Direct staff'.)

Setting options

The options screen is where many of the Administrator tasks are undertaken. It is presented when accessing 4cast for the first time, where you will be required to enter your licence information. After this point it will be accessible from the 'Home' tab of the ribbon menu or by pressing F9.

Many of the options available will be discussed during the implementation scoping meeting prior to application roll-out across your organisation, where applicable.

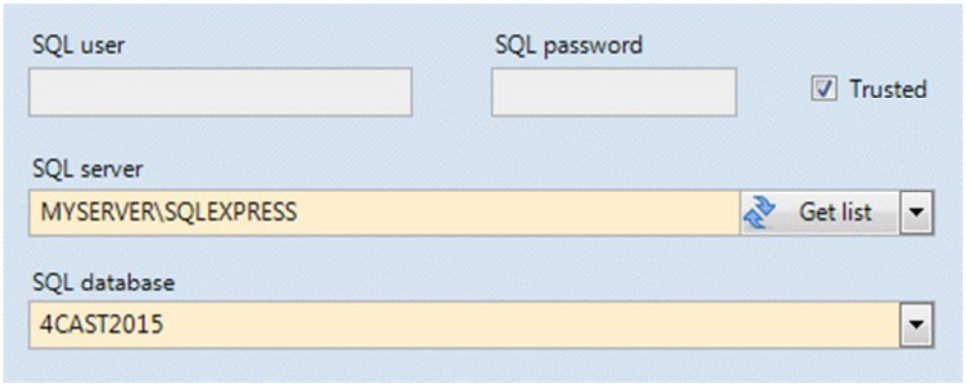
The options are organised into a series of tabbed pages. Click on a tab heading to activate that page.



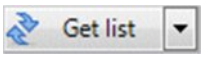
To save your settings click the save button or respond to the appropriate prompt when shown. On some pages the button is not shown as these are saved automatically.

Relevant further help and information is shown towards the bottom of each page.

Database connection



Enter the credentials necessary for the client to connect to the SQL server. The SQL server name should be entered in the format SERVERNAME\INSTANCENAME.

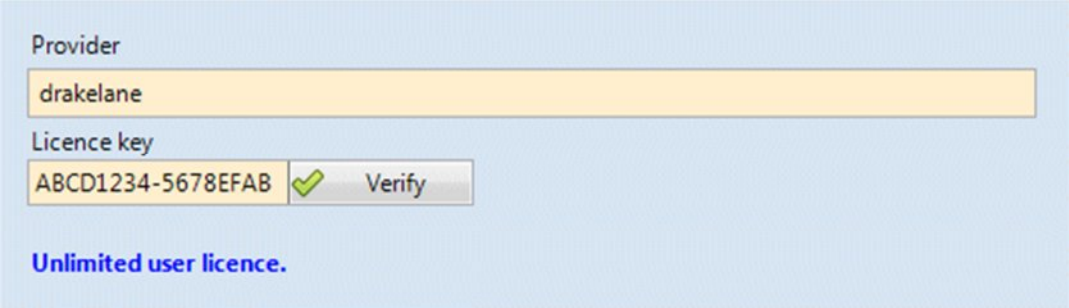


Click the button to get a drop-down list of available servers on the network.

Setting connection credentials automatically

Connection credentials can be pre-populated using a connection configuration text file generated by the server installer. For additional information please see the server installation documentation.

Licence

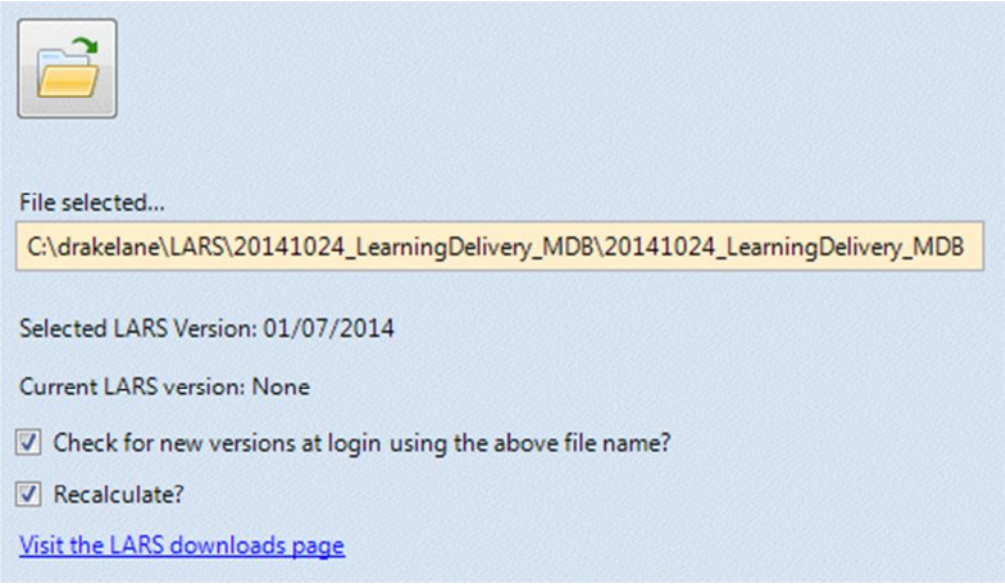


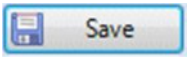
Enter your licence details and click the button to verify.

LARS

In order to calculate funding data from the Learning Aim Reference Service (LARS) is required. The database should be in Microsoft Access (*.mdb) format and is available for download from the Skills Funding Agency at The Hub.

Please ensure the download contains data for the academic year being planned.


File selected...
C:\drakelane\LARS\20141024_LearningDelivery_MDB\20141024_LearningDelivery_MDB
Selected LARS Version: 01/07/2014
Current LARS version: None
Check for new versions at login using the above file name?
Recalculate?
Visit the LARS downloads page



Import and update begins once all settings are saved.

Check for new versions at login

This option is recommended if you always download the database to the same location with the same filename. It will force the software to check this file next time an Administrator logs in to see if it contains updated funding information.

Recalculate

Forces recalculation of all scenario data using the file selected. Whenever a new file is selected this option is automatically ticked.

Visit the LARS downloads page

Takes you directly to the Skills Funding Agency LARS downloads page at The Hub.

Fields

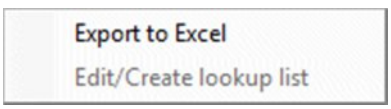
Change field settings and display options, including adding your own user-defined fields. For detailed information regarding system fields please see the Table Definitions Guide.

Note that setting a default value for a field will only affect new scenario data. Existing data can be updated using global updates.

You can also designate a field as an automatic formula, which means you can set this field to be a result of a mathematical function, which may involve one or more fields from the other tables. Once a field has been designated as a formula, users will no longer be able to edit it and the field will be highlighted in green.

Field name	Display name	Data type	Default	User defined?	Sort order	Restricted?	Formula
StartDate	Start date		01/01/1900	☐		☐	
SupersededBy	Superseded by			☐		☐	
TotalCosts	Total costs			☐		☐	
DirectNonStaff	Total direct non-staff cost		0	☐		☐	
DirectStaff	Total direct staff cost		0	☐		☐	
TotalFunding	Total funding			☐		☐	
TotalFundingGlobal...	Total funding		0	☐		☐	
TotalIncome	Total income			☐		☐	
TotalIncomeGlobal...	Total income		0	☐		☐	
TotalTargetLearners	Total learners			☐		☐	
OtherLearnerIncome	Total other learner income		0	☐		☐	
OtherNonLearnerInc...	Total other non-learner inco...		0	☐		☐	
Overheads	Total overheads cost		0	☐		☐	
Fee	Tuition fee		0.00	☐		☐	
UseActuals	Use actuals in funding?		0	☐		☐	
UseInTotals	Use in totals		False	☐		☐	
IsUserDefined	User defined LARS aim		0	☐		☐	
IsVocational	Vocational		0	☐		☐	
UIO_ID	UIO	Text		☑	0	☐	
				■		■	

You may add as many user-defined fields as you wish by moving to the bottom of the field list and entering the values required.



The right-click context menu allows export of the fields' data to Microsoft Excel and allows setting up of lookup lists for text user defined fields.

Field name

The SQL database field name.

Display name

This is the display name of the field in the client software.

Data type

This is the field data type. Changing the data type of an existing-user defined field should be used with caution as all existing values will be cleared from the field

Default value

The default value for new records added to a scenario.

User defined

This is a system flag indicating whether a field is user-defined.

Sort order

The field default sort order as listed in the single record view.

Restricted

This sets whether a field can be restricted (non-editable).

Formula

The formula (if any) assigned to this field. This should be used with caution as although data errors such as divide by zero are handled, it is possible for the result of the formula to be invalid, such as negative enrolments.

Other actions

Deletes a user-defined field, removing it from all scenarios. Use with caution! Also clears an existing formula from a field.

Opens up the formula wizard to allow amending or creating of a new formula.

Allows you to specify a selection list for user-defined text fields. If one or more items are added to this list then only items on this list are valid entries within a scenario.

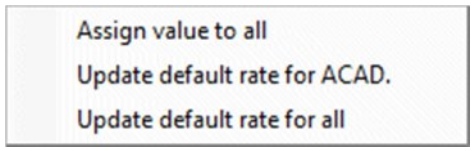
Department

A department is the unit representing the lowest level into which your organisation needs to be broken down so that individual users of the software can be assigned to one or more individual units and assume overall responsibility for them. Each Department may be assigned to one or more users. If you change the display name for the field DepartmentCode it will be reflected in the name of this options page in addition to throughout the software.

Departments are generated automatically when importing data into the database to create a new or add to an existing scenario. Department is a required field when importing data. If necessary, new Departments can also be added manually here.

Department code	Description	Default retention rate	Default achievement rate	Logged in?	
ACAD	Art & Design	100%	100%	☐	✖
AL10	Creative Arts	100%	100%	☐	✖
BL10	Media	100%	100%	☐	✖
BUSI	Business & Admin	100%	100%	☐	✖
CL10	Care	100%	100%	☐	✖
COLL	Chesterfield College	100%	100%	☐	✖
DLA	Drakelane	100%	100%	☐	✖
ED	Ed dept	100%	100%	☐	✖
ELC	Electrical Engineering - Ins...	96%	100%	☐	✖
ESSE	Essential Services	100%	100%	☐	✖

Default retention and achievement rates may be set at this level for use in the funding calculations. The right-click context menu allows you to set the same rate for every Department or flood the default retention and achievement rates through to the scenario.



Department code

This is the code used to identify a Department.

Description

This is the text description for a Department.

Default retention rate

This is the default retention rate for new records belonging to this Department.

Default achievement rate

This is the default achievement rate for new records belonging to this Department.

Logged in

Whether any users assigned to a Department are currently logged in.

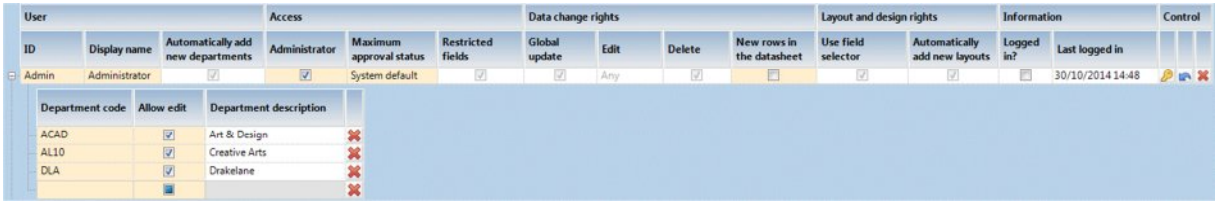
Other actions

Deletes a Department, removing it from all scenarios and from all users. Use with caution.

Users

Each user is given access to the scenario data for one or more Departments and can be assigned a range of permissions. These users and permissions are different and separate from the Windows credentials governing access to the SQL server and database.

Permissions relating to editing of planning data only apply to the live scenario. Users always have full edit permissions for their own non-live scenarios with the exception of shared scenarios (see the section on scenarios).



The right-click context menu allows assignment and removal of all Departments to and from a specific user and duplication of user and associated settings.

User

ID

The system user ID.

Display name

The name of the user displayed during login.

Automatically add new departments

Whether the user should automatically be assigned edit permissions for any new departments.

Access

Administrator

Grants or removes system Administrator permissions for the user. This automatically gives the user full permissions; you cannot turn off most of the different permissions for Administrators.

This allows access to the Options screen, gives edit permissions to the Allocations view and also adds the ability to save filters as system filters available to everyone.

Maximum approval status

This is the maximum approval status available to the user. Records in the live scenario with an approval status higher than this are read-only for the user.

Restricted fields

Does the user have access to fields specified as restricted?

Data change rights

Global update

Grants or removes global update permissions for the live scenario.

Edit

Sets permissions for where the editing of records from the live scenario can take place.

Edit permission	What this means
Non-live only	The live scenario cannot be edited in any view.
Single record only	The live scenario can only be edited in single record view.
Any	The live scenario can be edited in any view (default).

You can also set edit permissions for a user at individual Department level in the Allow edit column but at Department level permissions are simply granted or removed.

Delete

Grants or removes delete permissions on the live scenario.

New rows in the datasheet

Grants or removes permission to add new rows in the datasheet view on the live scenario. Adding new rows in single record view is unaffected.

Layout and design rights

Use field selector

Grants or removes permission to add or remove columns in the datasheet or programme views on the live scenario. This includes calculated formula fields.

Automatically add new layouts

Whether the user should automatically be assigned any new layouts created by Administrators.

Information

All actions are also available from the right-click context menu.

Logged in

This indicates whether the user is currently logged in.

Last logged in

This shows the time the user last logged in.

Other actions

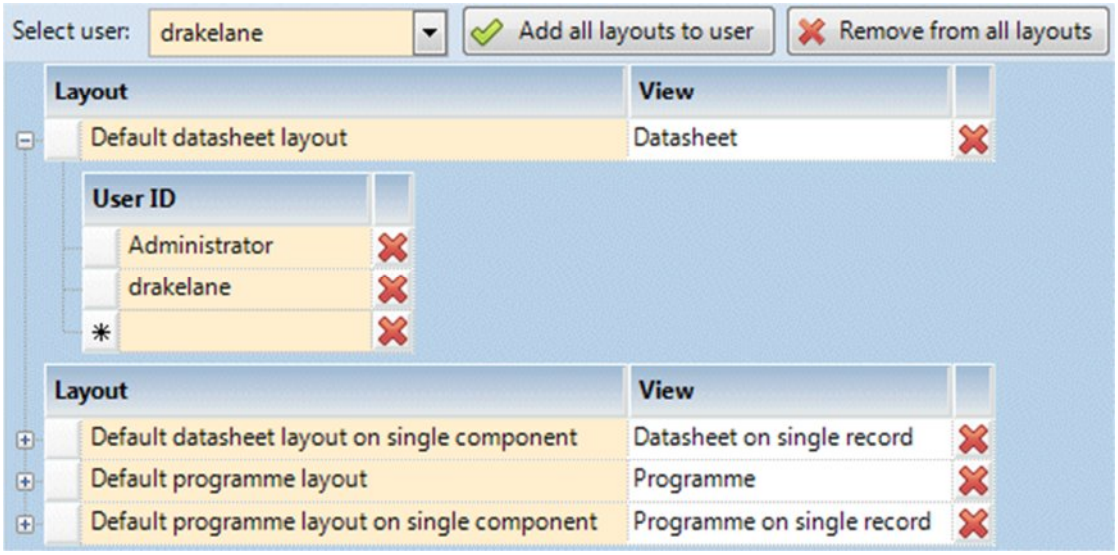
Changes a user's password.

Logs a user out.

Deletes a user. Note that the 'Admin' user cannot be deleted. On the sub-grid it removes a specific Department from a user.

Layouts

Any grid-based view can be arranged as required to show columns in a particular order and may also include filter criteria and sort ordering. Each specific arrangement is known as a layout and can be saved and assigned to users if required.



Layouts can be added or removed from users using the drop-down to select the user and then clicking the appropriate button.

The right-click context menu also allows global assignment, removal of a layout for all users.

Note that if an Administrator changes a layout then changes can optionally be applied to all users who have the layout currently assigned.

Layout

This is the name of the layout.

View

This is the view to which the layout is applicable.

User ID

This is the list of users who have been assigned to a layout.

Other actions

Deletes a layout, removing it from all users. On the sub-grid it removes a specific user from a layout.

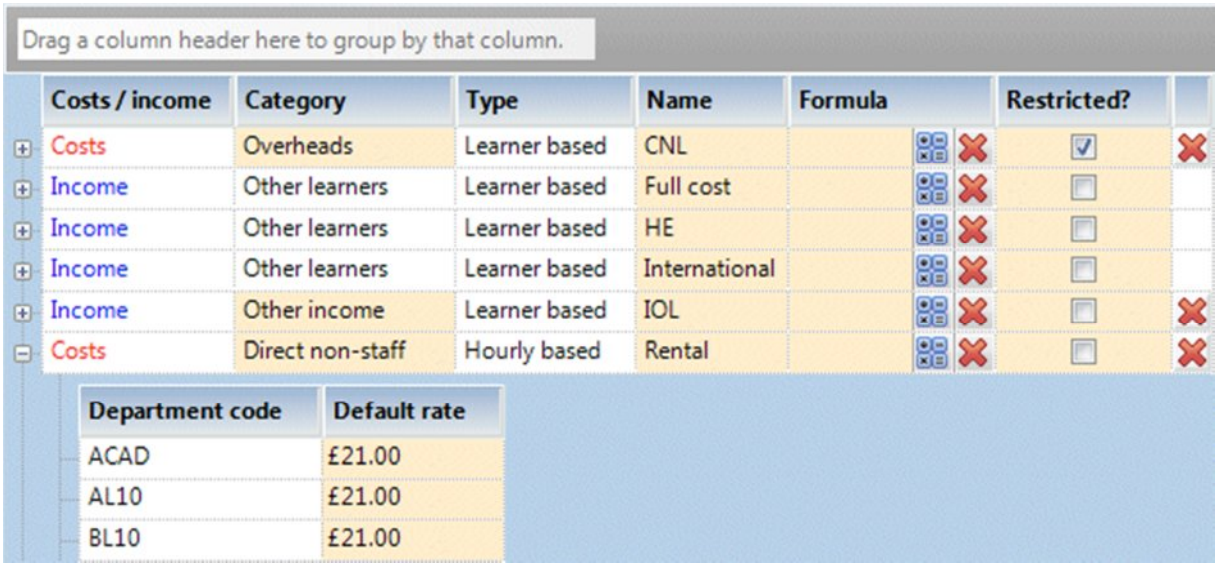
Costs and other incomes

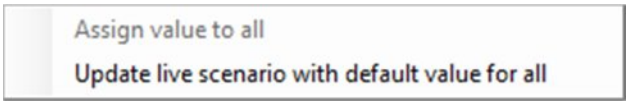
Similar to user-defined fields, you can also define fixed, hourly (for example staffing) and learner (for example examination fees) based costs and incomes within different categories. These allow additional

financial information to be included in the contribution calculations within your scenario. Like all other editable fields these incomes and costs can be the result of an assigned formula.

Cost or income	Category	Type
Cost	Direct staff Direct non-staff Overheads	Learner based Hourly based Fixed amount
Income	Other learners Other income	

There are a small number of system learner based, other learners incomes. These are HE, Full Cost and International.





The right-click context menu allows the default value to be reapplied to all existing data.

Costs/income

This shows whether the field should be treated as a cost or income. Costs and incomes are included on separate tabs in the single record view.

Category

This is the built-in cost or income category. The category is used to further differentiate within the separate cost and income tabs on the single record view.

Type

This indicates whether the field is fixed, hourly or learner based.

Name

This is the name of the field.

Default rate

This is the default rate for each Department when a new record is added to a scenario. This applies to hourly and learner based rates only.

Formula

The formula (if any) assigned to this field for the rate value. This should be used with caution as although data errors such as divide by zero are managed, it is possible for the result of the formula to be invalid, such as negative costs or incomes.

The right-click context menu allows the default rate to be applied to all Departments or reapply the default rate to existing data.

Restricted

This controls whether a field should be editable for users who have access to restricted fields turned off at user level. This applies to all fields associated with that income or cost.

Other actions

Opens up the formula wizard to allow amending or creating of a new formula.

(Next to formula) deletes a formula.

(Far right) deletes a cost or income, removing it from all scenarios and all Departments. Use with caution.

Conditional formatting

Conditional formatting allows you to set contribution thresholds for individual Departments and colour cells in the datasheet showing contribution percentage.

Department	Lower contribution % threshold	Higher contribution % threshold	Below threshold colour	Mid contribution colour	Above threshold colour
ACAD	0%	50%	Color [Red]	Color [Orange]	Color [LawnGreen]
AL10	0%	50%	Color [Red]	Color [Orange]	Color [LawnGreen]

You define the thresholds for lower contribution (between lower and mid) and upper contribution (between mid and upper) bands and the colours of the bands.

Other actions

Deletes customised conditional contribution formatting for a Department.

Approval status

Approval status	Approval level	Include in totals	
System default	0	☑	
Proposed	0	☑	✖
Delete	2	☑	✖
Approved	3	☑	✖
Declined	4	☐	✖
		■	✖

Approval status

Description for the approval status.

Approval level

Records with an approval level higher than the maximum set for a user are read-only.

Include in totals

Indicates whether the given approval status should be included in the statistics toolbar. An example (as shown) would be for the approval status 'Declined' not to be included in the totals.

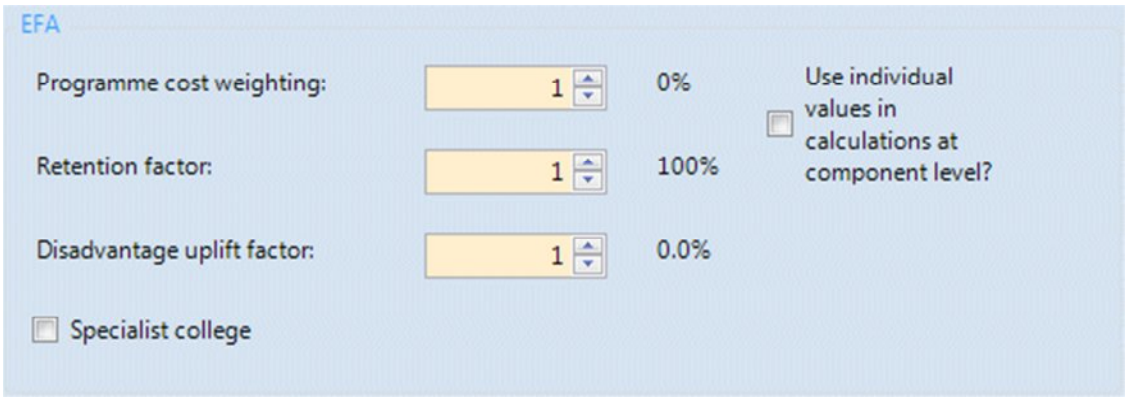
Other actions

✖ Deletes an approval status. Any scenario records having the deleted approval status are set to the system default (zero).

Factors

Several different factors apply to the funding calculations.

Education Funding Agency (EFA)

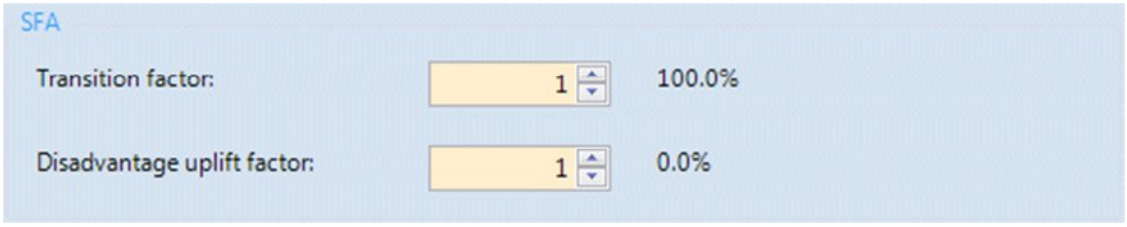


Programme cost weighting, retention factor and disadvantage uplift factor will be used to calculate EFA funding. Enter the values shown on your allocation.

There is a flag to override the provider-level values and use individual programme weightings and retention rates when looking at individual courses. This allows you to compare contribution levels on a like-for-like basis. The default is to always use provider-level values. For further information please see the Frequently Asked Questions.

Specialist agriculture, horticulture and animal care organisations should select the check box.

Skills Funding Agency (SFA)



Transition factor

The transition factor is applied to all new non-Apprenticeship starts in 2014/2015 to limit gains and losses resulting from the new system to no more than 3%, based on like-for-like provision.

Disadvantage

SFA disadvantage relates to learner postcode. Enter the default uplift factor that will apply to SFA funding. This default can be overridden at individual course level by setting the field SFA area cost override factor to a non-zero value.

Area cost

Select the area in which your organisation is located from the drop-down list.

Custom reports

Your own web server based reports can be defined for individual scenario records. The reports are then accessible from the datasheet by clicking the report button shown.

As an example, for the course code 'ABC123' in department 'BUS' the following URL would be opened in a browser for the report 'Standard course file' shown above:
http://reportserver/planning/coursefile.php?c=ABC123&d=BUS

Report name

This is the name for the predefined report.

Report URL

This is the web server URL for the report, including where necessary the character to indicate the start of a query, typically the question mark (?) symbol.

Separator

This is the separator character between query string parameters, typically the ampersand (&) symbol.

Parameter URL

This is the name of each query string parameter, including the separator character, typically the equals (=) symbol and [var] as a placeholder for the source field.

Source field

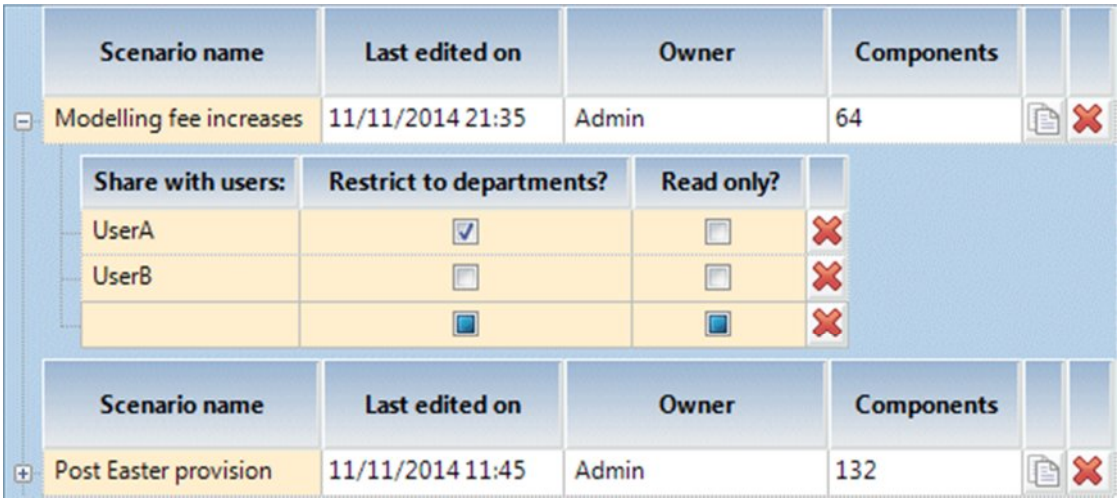
This is the scenario field used as the value for the parameter in the query string.

Other actions

Deletes a report. On the sub-grid it removes a specific parameter from a report.

Scenarios

All scenarios can be renamed and existing non-live scenarios can be copied to another user, shared with another user or deleted. The live scenario can also be renamed if required.



Scenario name

This is the name of the scenario.

Last edited on

This is the date the scenario was last edited.

Owner

This is the current owner of the scenario.

Components

This is the total number of components (individual records) in the scenario.

Share with users

Set the user(s) with which the scenario is shared.

Restrict to departments?

Should the shared scenario be limited to only the departments what the shared with users have access to.

Read only?

This sets whether the shared scenario is opened read-only for the specified user.

Other actions

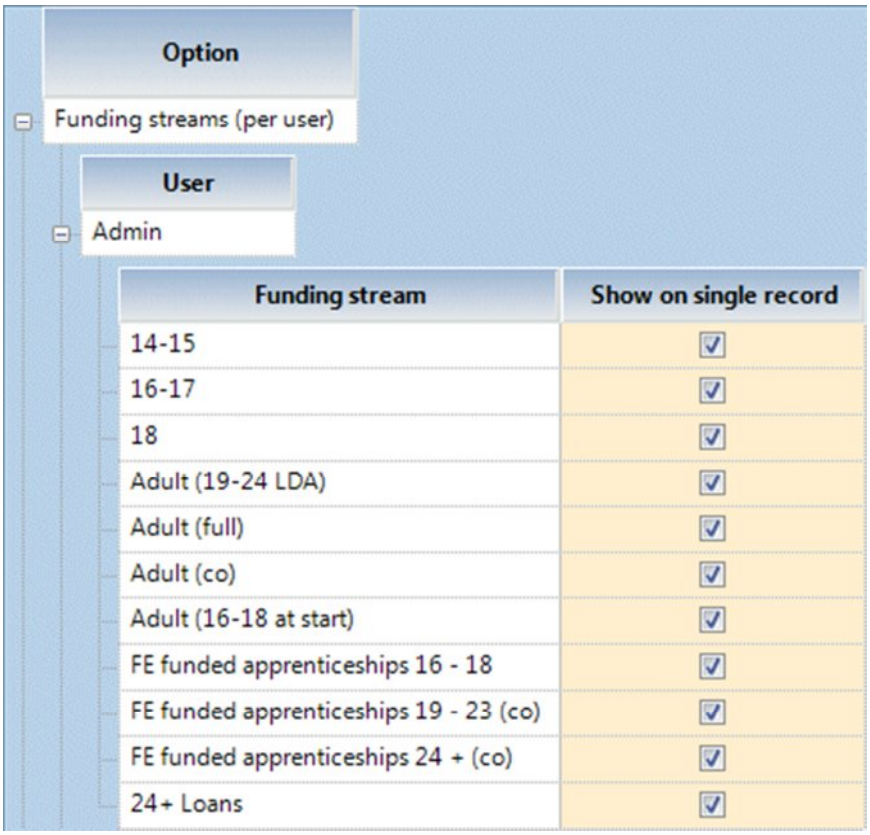
Copies a scenario to another user.

Deletes a scenario. Use with caution.

Single record view

These settings are specific to the single record view only. Drill down to the required option.

Funding streams (per user)



Individual funding streams can be shown or hidden for individual users in the single record view.

User

The user to alter funding streams for.

Funding stream

The funding stream name as it is shown on the single record view.

Show on single record

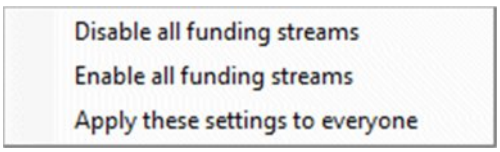
Tick this to show this particular funding stream on the single record view.

Fields visible

Certain field can be globally hidden in the single record view.

Field

This is the field name that can be shown or hidden (default).



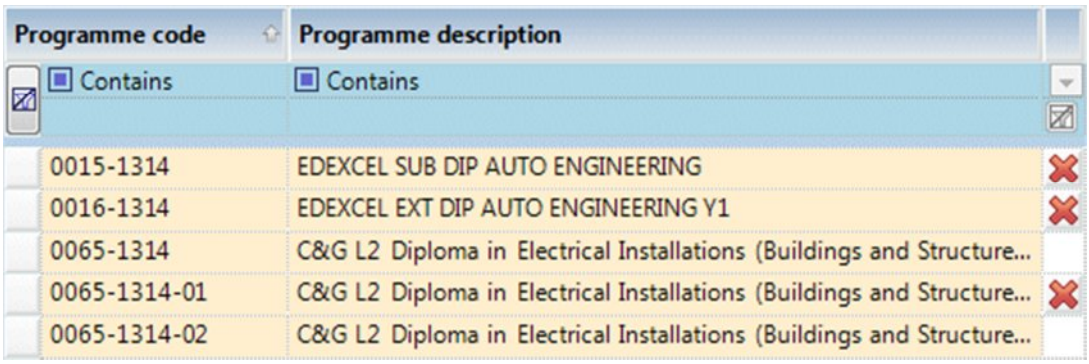
The context menu allows for quick disabling and enabling of all funding streams as well as copying the settings for the current user into all other users.

Visible?

Is the specified field visible on the single record view?

Programmes

Programmes can be edited here or deleted if not in use.



Programme code	Programme description
Contains	Contains
0015-1314	EDEXCEL SUB DIP AUTO ENGINEERING
0016-1314	EDEXCEL EXT DIP AUTO ENGINEERING Y1
0065-1314	C&G L2 Diploma in Electrical Installations (Buildings and Structure...
0065-1314-01	C&G L2 Diploma in Electrical Installations (Buildings and Structure...
0065-1314-02	C&G L2 Diploma in Electrical Installations (Buildings and Structure...

Programme code

The code which groups related individual components together.

Programme description

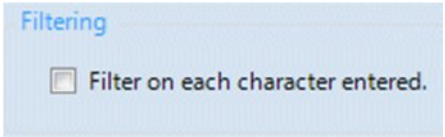
This is the programme description.

Other actions

Deletes a programme. Only programmes that are currently unused in any scenario can be deleted.

Other

Filtering



By default filtering is not applied until the cursor moves to another cell in the scenario (for example by pressing the tab key). Filtering can be dynamic and applied as each character is typed into the field filter. For very large scenarios or on a congested network dynamic filtering may be slow.

Creating and updating a scenario by importing data

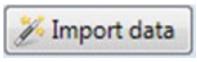
The SQL database is installed with no planning data. Populating the system will be discussed prior to and during the implementation scoping meeting with one of our consultants.

Although it is possible to manually input all of your planning data, we find the most productive and efficient use of time and resources is to use data from the current year as a basis to begin planning for the following year. There is also the option for existing customers to roll forward planning data from the previous year.

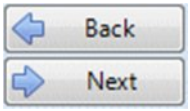
Prior to our first onsite visit we normally request a CSV (comma separated values) text file containing current year data you have available plus additional information you may wish to include. This allows us to focus on and discuss data that is familiar to you, though it may not be the initial plan you settle on and you may wish to perform subsequent data imports.

Subsequently, you may wish to bring in actual data in order to make comparisons with your original plan or to make assessments of the planning process.

Using the data import wizard



The data import wizard is available from the import section of the Home ribbon menu tab and from the button on the Open scenario dialog.



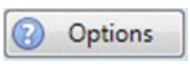
The wizard presents a series of tabbed pages that walk you through the necessary stages. You can move freely between pages using the tabs that are currently open or the navigation buttons.

Relevant further help and information is shown towards the bottom of each page.

Import mode

You can select whether to add new or update existing scenario data. The add option allows you to append new data to a new or existing scenario, with the option of clearing all existing data. The update option allows you to alter data that already exists.

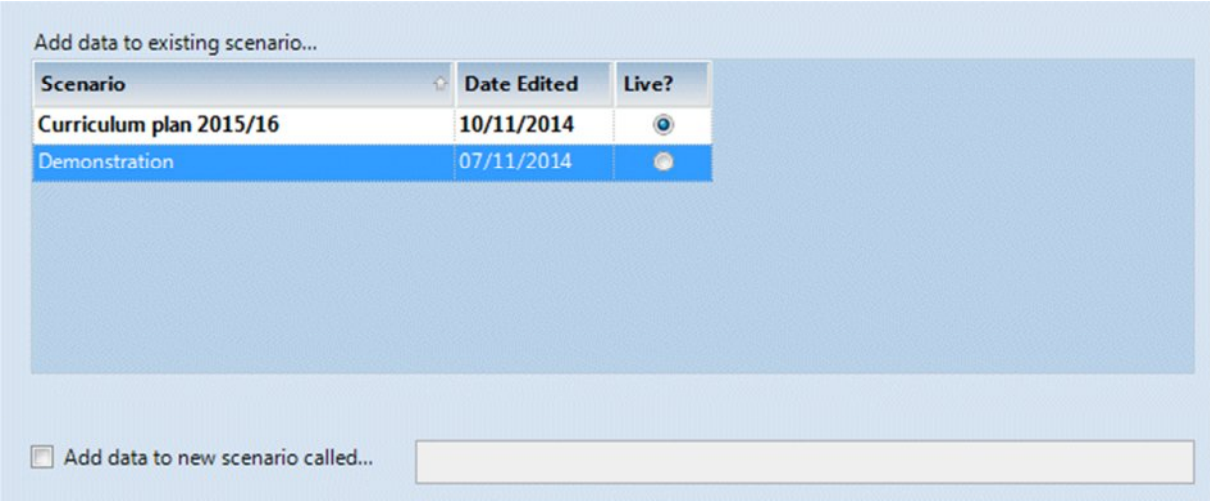
Though there are some differences between the 2 modes, many of the wizard stages are common to both processes.



Clicking the options button opens the Options at the Fields page to allow you to change field names presented later during the import process.

Scenario

Select the existing scenario to add data to or enter the name for a new scenario. The live scenario is indicated in the list.



Delimiter

Select the field delimiter and text qualifier that are used in the import file.

Select file

Click the button to browse and select a text file for import or drag-and-drop the file onto the form.

The import file should have a *.txt or *.csv extension. Then name and location of the file will be remembered for subsequent imports.

Field mappings

Select the fields or columns that are contained in the import file and the order in which they appear. To move fields from available to selected (and vice versa) use the buttons or double-click the field name. Not every field will be shown (for example, fields that cannot be edited and fields that are set up as formulas).

Some fields are required when creating a new or adding to an existing scenario. These fields are pre-selected and indicated with a gold star.

System fields are indicated with a blue arrow.

User-defined fields are indicated with a green arrow.

Move all columns to/from the available/selected fields.

Click to ignore this field in the import file.

A sample showing the first 5 rows in the import file is shown in order to assist in field selection and order. It is useful to include column headings in your export file to make this process even easier.

Aim type	Course code	Department	End date	FE funded	Aim ref	Hours planr
Department Code	Department Title	Course Code	Course title	Learning Aim R...	Aim type	Learning Sta
ME	PROFESSIONAL...	ME410Q073	CIPS L4 DIPLO...	10061125	4	03/09/2012
CG	PROFESSIONAL	CG301P064	EDEXCEL L3 DI..	50071373	4	10/09/2012

The column headings will adjust to match the order of the fields selected.

Key fields

Selected column	Key field
Aim ref	☐
Aim type	☐
Course code	☑
Department	☐
Full cost (Actual 14/15)	☐
Full cost (Actual 15/16)	☐
Full cost (Learners)	☐
Full cost (rate)	☐
Grant income (Actual 14/1...	☐
Grant income (Actual 15/1...	☐

If you are importing a file in order to update existing scenario data this page will be shown and you must select the key fields to match between the import data and the scenario records.

The other fields will be used to update existing scenario records from the import file.

Validation

Validation of the import file can be adjusted as required.

☑ First line contains header and can be ignored.

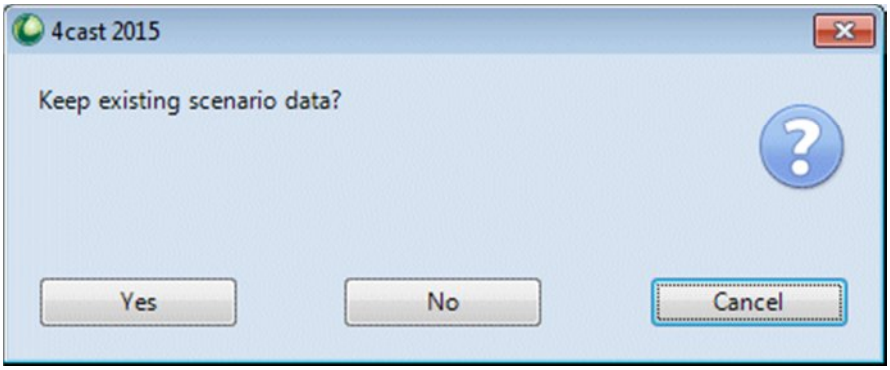
If the first line contains field names select this option.

Dates

If the import file was created from existing data in the current year but is to be used for the following year's plan, then you should roll the dates forward.

Import

When ready click the Finish button to begin the import process.

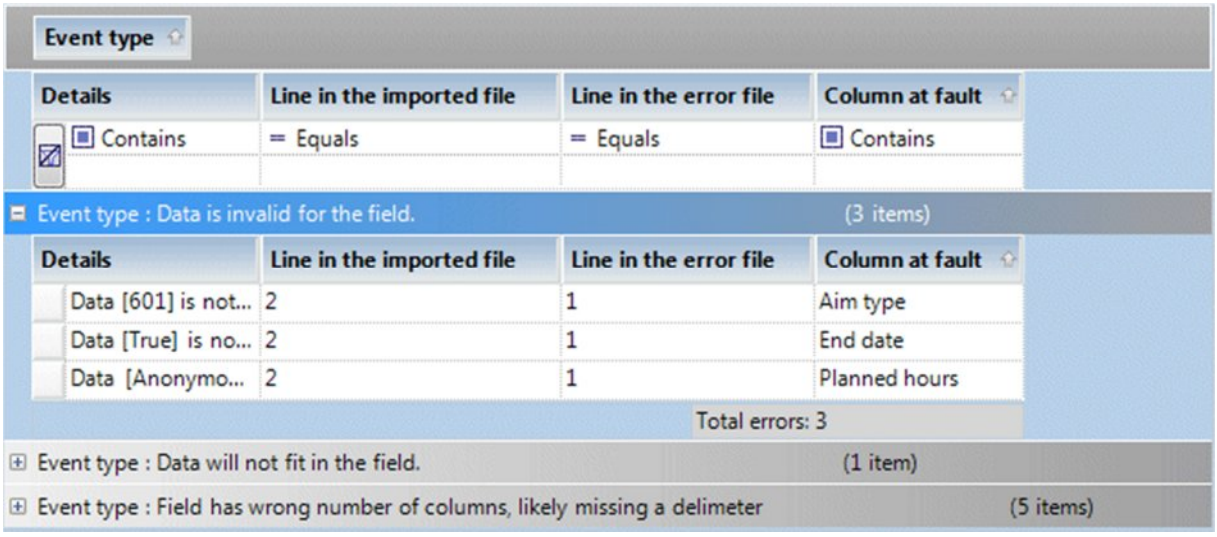


If data already exists in the scenario a prompt will be shown.

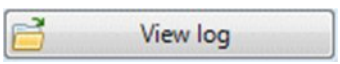
a. Yes will add the imported data to the existing scenario
b. No will clear the existing data first before importing
c. Cancel will abort the import.

Results

If there are errors during the import process then the results tab will be shown. By default the import results are grouped by event type but this can be removed or changed as required.


Event type
Details
Line in the imported file
Line in the error file
Column at fault
Contains
Equals
Equals
Contains
Event type : Data is invalid for the field. (3 items)
Details
Line in the imported file
Line in the error file
Column at fault
Data [601] is not... 2 1 Aim type
Data [True] is no... 2 1 End date
Data [Anonymo... 2 1 Planned hours
Total errors: 3
Event type : Data will not fit in the field. (1 item)
Event type : Field has wrong number of columns, likely missing a delimeter (5 items)

The field records are saved to a new file of the same name with the addition of _bad to the filename. It can be adjusted and re-imported by clicking the button shown.



The full import log can be viewed by clicking the button shown. Our support team may request this file for debugging purposes.

Required fields

The following fields are required when creating a new or adding to an existing scenario:

Field	Type	Format	Notes
Aim type	Integer	1 or 2	1 = Main aim. 2 = Component aim.
Course code	Text	20 characters	Code identifying an individual record.
Department	Text	20 characters	Department (or equivalent) code.
End date	Date	DD/MM/YYYY	End date of the whole programme not in-year.
FE funded	Boolean	1 (true) or zero (false)	Is the record FE funded?
Aim ref	Text	8 characters	Learning Aim reference from LARS.
Planned hours	Integer	Zero or more	In-year not whole programme.
Programme code	Text	20 characters	Code identifying a programme to group related individual records.
Start date	Date	DD/MM/YYYY	Start date of the whole programme not in-year.

Recommended fields

Though not required, the following fields are also recommended:

Field	Type	Format	Notes
Basics			
Course title	Text	100 characters	Course title or description.
Department title	Text	100 characters	Department title or description.
Programme title	Text	100 characters	Programme title or description.
Additional option	Boolean	1 (true) or zero (false)	Additional option indicator for main aim or component.
Planned EEP hours	Integer	Zero or more	Employability, enrichment and pastoral hours. This field can be optionally shown in single record view.
Income			
EFA learners			
14-15	Integer	Zero or more	Actual enrolments[1].
16-17	Integer	Zero or more	Actual enrolments[1].

Field	Type	Format	Notes
18	Integer	Zero or more	Actual enrolments[1].
Adult (19-24 LDA)	Integer	Zero or more	Actual enrolments[1].
SFA learners			
Adult (full)	Integer	Zero or more	Actual enrolments[1].
Adult (co)[2]	Integer	Zero or more	Actual enrolments[1].
Adult (16-18 at start)	Integer	Zero or more	Actual enrolments[1].
16-18 apps	Integer	Zero or more	Actual enrolments[1].
19-23 apps[2]	Integer	Zero or more	Actual enrolments[1].
24+ apps[2]	Integer	Zero or more	Actual enrolments[1].
24+ loans[2]	Integer	Zero or more	Actual enrolments[1].
Other learners			
Full cost	Integer	Zero or more	Actual enrolments[1].
HE	Integer	Zero or more	Actual enrolments[1].
International	Integer	Zero or more	Actual enrolments[1].
Costs			
Direct staffing			
As appropriate			You may want to consider direct staff costs (for example assessors and lecturers) [3].
Direct non-staffing			
As appropriate			You may want to consider direct non-staff costs (for example exam fees, materials and capital items) [3].
Overheads			
As appropriate			You may want to consider overheads (for example heating and lighting) [3].
User defined			
Notes			
Notes	Text	2^30 minus1 characters	A very large text field for storing notes.

Field	Type	Format	Notes
User defined			
As appropriate			You may want to consider other user defined fields (for example day, lecturer and site). The type and format of the field will be dependent on the setting in options.
Advanced			
Retention rate %	Decimal	Between zero and 1	In-year not whole programme.
Achievement rate %	Decimal	Between zero and 1	The common standard achieved of completers.
Adjustment factor (various)	Decimal	Between zero and 1	Use for adjusting funding as appropriate.
Adjustment factor (various) applies to	Integer	Zero, 1 or 2	Zero = Apply adjustment to EFA only. 1 = Apply adjustment to SFA only. 2 = Apply adjustment to both (default).
ILR aim type	Integer	Zero or more	The ILR learning delivery AimType. You may want to consider providing this in order to populate your ILR at a later date.

Notes

1. Actual enrolment fields occur twice to allow for 3 sets of enrolment data: current year actual, planned targets and subsequent actual.
2. These fields have an accompanying currency based in-year fee field.
3. Accompanying information may require import dependent on whether the field is hourly based (hours, hourly rate and groups), learner based (learners and learner rate) or a fixed amount (fixed).

Validation of individual scenario records

Immediately following import or at any time by selecting the Validation view from the main menu you can see all of the internal validation rules and the associated records within the scenario.

Error	Records contain errors and funding may not be calculated correctly or at all.
Warning	These records require further investigation to ensure they are correct.
Rule only	All records have passed this validation rule and the rule is shown for information only.

Rules can be expanded and contracted by clicking the + and - buttons to show the affected records. Double-clicking the record will take you to the same record in datasheet view.

Import file tips

There can be many reasons why importing data may fail to varying degrees. Following the tips below should help you to avoid some of the more common pitfalls.

- Text fields may contain commas (for example course titles). As one of the most common delimiters is comma we suggest using a text qualifier or changing the field delimiter. Without

doing so the field order can be read out of sequence and the record may fail to import or import incorrectly.

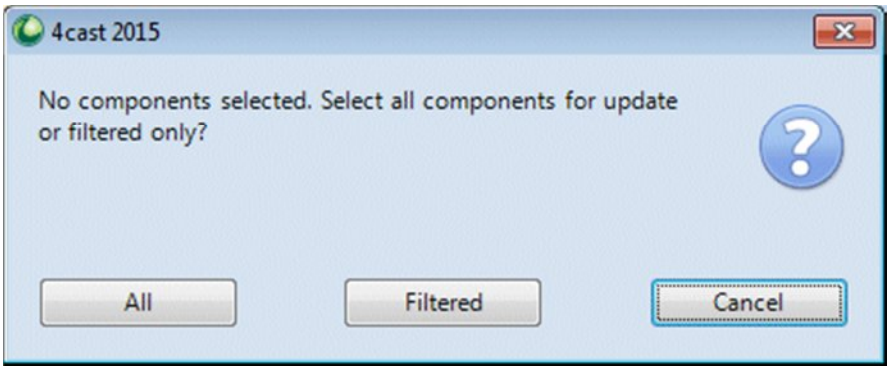
- When importing data into Boolean (yes/no or true/false) fields use the numeric values 1 (one) and 0 (zero).
- When importing data into percentage (%) fields use decimal values with 0.00 (zero) representing 0% and 1.00 (one) representing 100%.
- Format currency data as decimal without the £ (pound) symbol.
- Remember to select the option to roll-forward start and end dates if using current year data for the import to use as a basis for planning the following year.
- The start and end dates are for the whole programme not in-year.
- All hours are in-year not whole programme.
- Retention rates are in-year not whole programme.
- The aim type is an indicator for main or component aims within a programme not the ILR aim type (this is provided as a separate advanced filed if required).
- Programme code is needed to present information in the programme view and for calculating EFA funding at learner level. Everything should have a programme code.
- Use the first row of the import file for field names to help in the field mapping process. If you do so, remember to select the option to ignore the first line in the validation options.

Performing global updates

Global updates are a powerful yet simple way to make wholesale changes to data very quickly. For this reason they should be used with caution. They can be extremely useful in creating variations of the same scenario to perform 'what-if' modelling on your planning data.

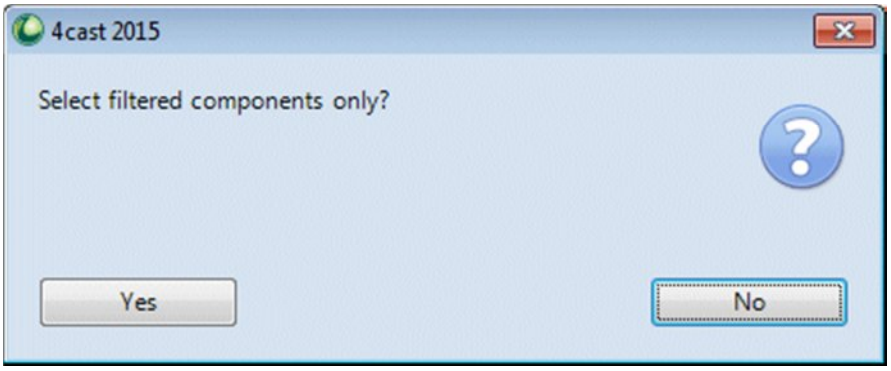
You can access the global update function from the Edit menu.

A global update can be applied to as many or as few records as required by filtering your data before applying the global update.

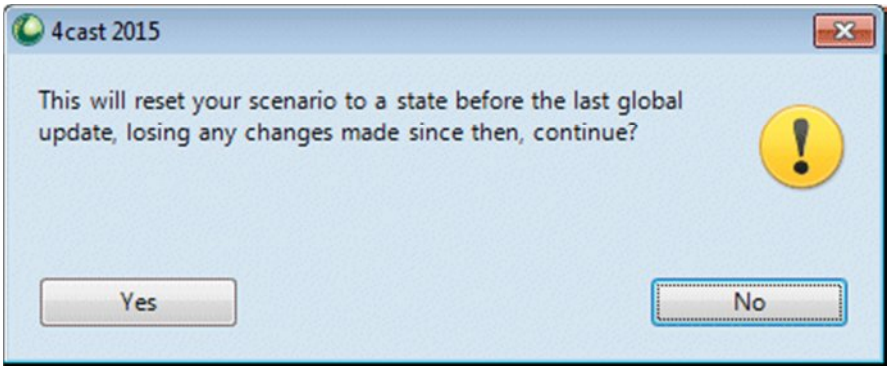


Update now will perform the global update on the selected components.

If no components are currently selected you will be prompted to select all or just use the filtered components.



Select all will select all components for global update or optionally just filtered components if a filter is applied.

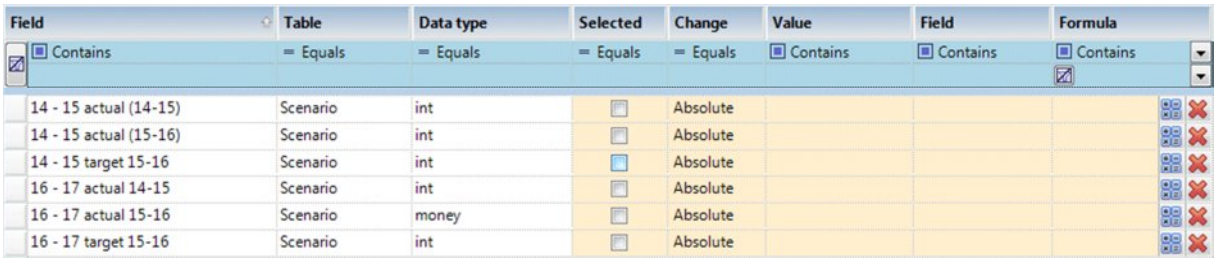

4cast 2015
This will reset your scenario to a state before the last global update, losing any changes made since then, continue?
Yes
No

Undo to last will roll back all changes so the scenario is exactly the same as it was prior to applying the last global update.

This includes rolling back any other changes made by any user since applying the last global update.

Setting global update options

The options allow you to make changes to one or more fields simultaneously.



Field	Table	Data type	Selected	Change	Value	Field	Formula
Contains	= Equals	= Equals	= Equals	= Equals	Contains	Contains	Contains
14 - 15 actual (14-15)	Scenario	int		Absolute			
14 - 15 actual (15-16)	Scenario	int		Absolute			
14 - 15 target 15-16	Scenario	int		Absolute			
16 - 17 actual 14-15	Scenario	int		Absolute			
16 - 17 actual 15-16	Scenario	money		Absolute			
16 - 17 target 15-16	Scenario	int		Absolute			

A list of all the available fields that you can select from to make changes to is shown, along with the source table and data type of each field.

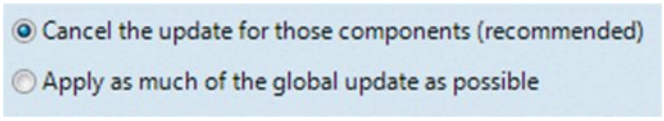
The right-click context menu allows you to save the current and load previously used global updates, for example to reapply them. These are saved on a per-user basis.

Types of change that can be made

- Select or deselect which fields you want to make changes to.
- Choose the type of change you wish to make from the drop-down box.
- Enter data in the appropriate column for the change to be based on.

Change	What this means
Absolute	Change the selected field to a specific absolute value or value of another field or result of a formula.
Relative	Change the selected field by a % relative to the existing value. The % is as entered in the value field or can be based on another field or result of a formula. Percentage values can be negative or positive with 1.00 being equivalent to 100%.
Differential	Change the selected field by adding or subtracting the value entered or value of another field or result of a formula. The value can be positive or negative.

Avoiding invalid changes



Global update actions on individual fields may not be possible as they would produce invalid results.

Global update examples

Set the 16-17 target enrolments to be the same as the 16-17 actual enrolments	
Field	16-17 Target 14-15
Original value	20
Change	Absolute
Field	16-17 Actual 14-15
New value	16-17 Actual14-15
Increase adult co-funded tuition fees by 15%.	
Field	Tuition fee
Original value	£600
Change	Relative
Value	1.15
New value	£690
Decrease the adult fully funded target enrolments by 2	
Field	Adult target fully funded 15-16
Original value	10
Change	Differential
Value	-2
New value	8

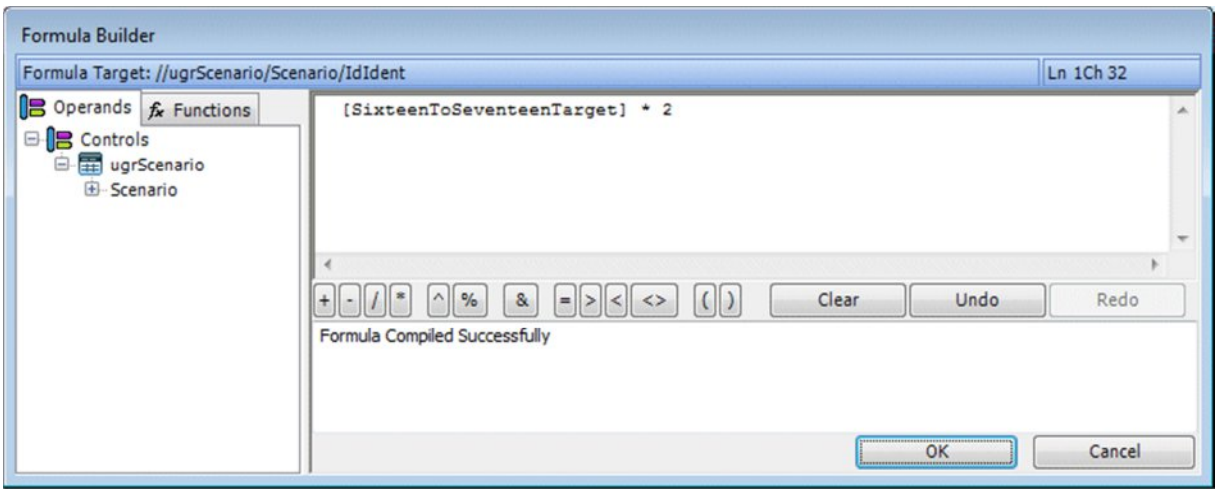
Using the formula builder

The formula builder allows you to create customised formulas to:

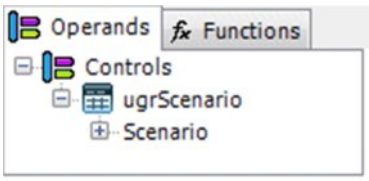
- Perform global updates to existing database scenario fields based on the result of a formula using simple operands
- Create calculated fields within the scenario based on the result of a formula using operands and/or more complex functions

Entering formulas

The formula builder looks and functions in a similar way to many other software packages.



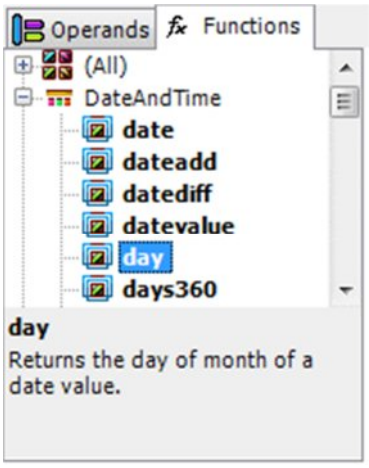
Operands



The operands section allows you to select fields that are already part of the scenario (the same as the list shown in the field selector).

Pre-existing formula fields are prefixed with Calc:- in the list.

Functions



The functions section allows you to include built-in functions as part of the formula. Functions are grouped into categories which are similar to those in Microsoft Excel:

- Date and time
- Engineering
- Financial
- Information
- Logical
- Lookup and reference
- Math
- Statistical
- Text and data

A description of the selected function is also shown at the bottom.

Note that functions are only available in non-system formulas.

Creating calculated (non-system) formula fields

Calculated formula fields can only be added or removed by users with Administrator permissions. They are saved as part of the layout and not stored as data in the SQL database, therefore to make them permanently available the layout must be saved.

You can add (and remove) formulas using Edit menu. Formulas can be added to the following scenario views:

- Datasheet
- Programme (upper and lower sections, though the lower section is the Datasheet view)
- Summary
- Monthly breakdown

Formula fields are shown with green column headers within each datasheet and are also displayed this way in the field selector.

To edit the existing formula using the formula builder click the Σ symbol. If after pressing Σ the formula is greyed out then this means that it is an existing field with an assigned formula (system formula)